Phoenix Program
Process Definition – Purchasing Module

Process	***Request For Quote & Award Statewide Contract (SWC)***
Process Number	***PO – 018*** *Previously Revised 4/8/99 Latest Revision 4/20/99*

Description of Process

This process describes the bidding and award of a statewide contract by State Purchasing.

Input to Process

RFQ

Output of Process

Notice of Award Report, Contract Data Report, Contract Item Schedule Report, Item Catalog

Service Level Agreement Required? (if yes, provide a brief description)

PeopleSoft Panel Groups being Used

Function	Panel Group
RFQ Creation	Request Quote
Vendor Selection	Vendor Association by NIGP
Dispatch RFQ's to Vendors	RFQ Form
Enter Vendor Responses	Enter Responses
Enter RFQ award data	Award Quote (Analysis & Awards panel only)
Print Notice of Award	Award Quote
Update Contract Data	Contract Data
Print Contract Data Report & Item Schedule	Contract Data

State of Georgia

Business Process Description

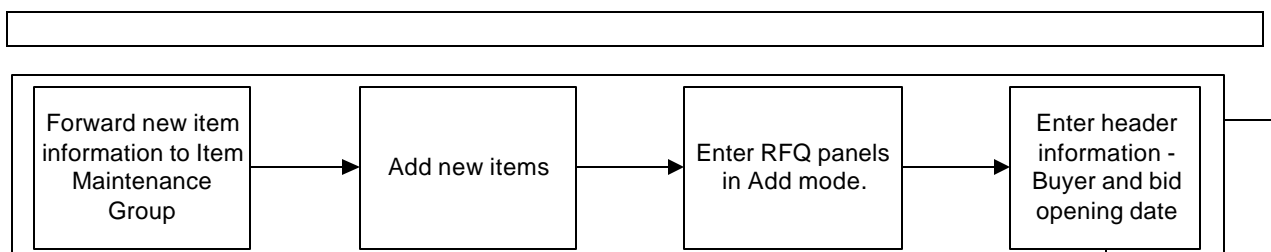| Process Description	Responsibility (Agency/Centralized)
Step 1: If a new contract or if new items have been added to an existing contract; forwards item descriptions, unit of measure, appropriate 5 digit NIGP, anticipated effective and expiration dates, etc. to Item Maintenance Group for adding to the system.	State Buyer
Step 2: Adds items to system, see Process Definition - Items	Item Maintenance Group
Step 3: Once all items are in the system, navigates to Manage Request for Quotes Menu (Go, Administer Procurement , Manage Request for Quotes) to create RFQ.	State Buyer
Step 4: Navigates to the RFQ Header panel (Use, Request Quote, Header, Add). Selects Business Unit 99999 and clicks the OK button. This will display the Header panel.	"
Step 5: Selects the appropriate buyer, and enters the bid opening date and time. Coordinates bid date and time selection with the bid room. Buyer also selects the appropriate location associated with the return address for the RFQ (SP_0000001). The defaulted Billing Address should be left alone but verify that it is SP_0000002. The SWC checkbox should also be checked.	"
Step 6: Go to the "Line" panel tab and key the appropriate item number and estimated quantity. Make sure the "Ship to" code is SP_0000002, the "Ship Via" is "Common" and the "Freight Trms" are "DN". Blank out the "Schedule Date" and "Lead Time" days. (You will have to blank out the "Schedule Date" twice) Insert rows and repeat for each line on the contract.	"
Step 7: Go to the "Activity" panel tab, verify an activity date of 01/01/1902 and enter a bid description into the "comments" field. This description will be posted to the Internet and should be keyed such that the "key" word of the description is the first word since vendors will use an alpha search on this field. **Do not uncheck the "Post" checkbox next to the bid description. This designates that the bid should be posted to the Bid Registry on the Internet. All bids processed by State Purchasing should be posted.**	"
Step 8: After completing entry of all data, returns to the "Header" panel tab, changes status to "Approved", and saves panel.	"
Step 9: Navigates to "Vendor by NIGP" panel. (Use, Vendor Selection by NIGP, Vendor by NIGP, Update/Display) Key RFQ number and press enter.	"

Step 10: Use top scroll bar on the panel to select the NIGP code by which to produce a list of vendors. Click on the flashlight to display a list of vendors in the bottom scroll bar. Select the vendors by clicking the checkbox to the left of each vendor. These vendors will be displayed in the middle scroll area. NOTE: You can go back to the top scroll, select another NIGP code, click the flashlight again, and then select additional vendors.	"
Step 11: Go to the "Vendor List" panel. The selected vendors will be displayed. Additional vendors can be added by inserting new rows (F7 & or Insert icon) and keying in the appropriate vendor number. Vendors can be deleted by placing the cursor in the Vendor ID field and using the delete icon or F8. NOTE: Control F4 can be used to search by vendor short name.	"
Step 12: Click the magnifying glass by each vendor to display their first address. Use the drop down arrow to display a list of additional addresses. Select the appropriate address for each vendor. Save the panel.	"
Step 13: Dispatch quote forms to vendors. Navigate to "RFQ Form" (Report, RFQ Form, Update/Display). Enter Business Unit and RFQ ID and run process to Print RFQ's.	"
Step 14: Mail RFQ forms to vendors. Make one copy of RFQ form to maintain with purchasing file. Forward file to Bid Room.	Buyer or Support Personnel
Bids are returned to the bid room prior to the bid opening date. On the bid opening date they are opened and read. The bid forms are then placed in the file and forwarded to the buyer.	
Step 15: Buyer reviews bids and enters prices into the system. Navigates to "Enter Responses" panel (Use, Enter Responses, Header). Selects any vendors who responded to the bid invitation and enters the vendor's payment terms and updates the Response Type.	"
Step 16: Goes to the "Line" panel, checks "Vendor Responded" for each line bid, and enters prices and lead times for each line.	"
Step 17: Navigates to the Analysis and Awards Panel. (Use, Award Quote, Analysis and Awards) Buyer reviews vendor pricing and determines which vendor will receive the award for each line, and enters quantities to be awarded for each line. You will be prompted with a message "Would you like to create Item/Vendor data now?". Click on the "Cancel" button. (If you click "Yes", the vendor and price will be added to the item data effective immediately, meaning that users would be able to start buying from the new vendor prior to the effective date of the new contract). **DO NOT CONTINUE TO THE "CREATE PO" PANEL FOR CONTRACTS.**	

Step 18: After all award data has been entered, save the panel. Then select the Notice of Award report from the Report Menu and runs the report. Forwards to support personnel for distribution to agencies, vendor, FSS item tree maintenance group and State Purchasing Item Maintenance Group. **NOTE: Before running the Notice of Award Report, be sure to indicate the contract effective and expiration dates in an RFQ header comment and check "Send to Vendor".**	Buyer
Step 19: Makes necessary copies and distributes. Mails original Notice of Award to awarded vendor(s). Forwards copies of Notice of Awards to Item Maintenance group and the FSS tree maintenance group.	Support Personnel
Step 20: Runs Awarded Bid Results Report and forwards to Bid Room.	
Step 21: State Purchasing Item Maintenance group updates items with new vendors and prices (See Item Maintenance Process)	Item Maintenance Group
Step 22: FSS item tree maintenance group updates the item catalog trees (See Item Tree Maintenance Process) Informs State Purchasing Buyer when updates are complete.	FSS Item Tree Maintenance Group
Step 22: Navigates to Manage Contract (Go, Administer Procurement, Manage Contracts)	Buyer
Step 23: Navigates to the Contract Data Panel (Use, Contract Data, Add) Enters an effective date equal to the contract effective date, and other contract data for each awarded vendor. Save panel.	"
Step 24: Runs Contract Summary Information Report and Contract Item Schedule from the Report Menu. **(NOTE: Item Schedule report should not be run until all item and catalog updates have been completed by the Item Maintenance group and the FSS item tree maintenance group. Report request requires entry of contract Expiration Date which must have been updated on all items.)** Forwards reports to support personnel for copying and distribution.	"
Step 25: Makes copies and mails to agencies.	Support Personnel.

Forms Used with Process (#)

**Attach sample form(s)

| Forward new item information to Item Maintenance Group | → | Add new items | → | Enter RFQ panels in Add mode. | → | Enter header information - Buyer and bid opening date |

Process Signoff

Tested By
Date Tested